Briefing Guide

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Table of Contents

Overview	3
Our Customers	3
Briefing Lifecycle	4
Plan the Agenda	5
Briefing Resources	6
Briefing Roles and Responsibilities	6
Training Resources	6
Business Brief	7
Prepare for a Briefing	8
Technical Levels of a Briefing	9
Schedule Briefings	10
Perform Additional Customer Research	10
Pre-Briefing Call	10
Prepare Your Team for a Briefing	11
Delivering a Briefing	12
Post-Briefing Activity	13

Overview

Through Briefings, we honor our commitment to provide the best possible customer journey by inspiring businesses in any stage of development.

Briefings

- Are an integral part of the Business customer journey.
- Create a collaborative environment to discover possibilities.
- Encourage customers to look beyond the immediate transaction.
- Help us build an action plan to integrate Apple products, services, and solutions into a business.

Our Customers

Briefings can benefit our customers in different stages of growth and evolution. They can be used to address immediate needs while planning for the long term.

Start: The customer needs to know how a newly minted idea or passion can turn into reality.

Grow: The customer may quickly need to add and manage technology based on hiring demands or a new project. Briefings may involve multiple parties, such as IT, Operations, and Finance.

Evolve: Briefings with these customers leverage seasoned resources to deeply understand their needs and examine the complex implications of changing platforms or purchasing strategies.

Briefing Lifecycle

Identify Briefing Opportunity

Discovery

Initial conversations with customer to learn more about their immediate needs.

Pre-Briefing Call

Prepare Your Team

Deliver Briefing

Includes all relevant internal and external partners and attendees from the customer's business.

Update Apple CRM

Assess Briefing

Customer Follow Up

Initiates all the validated action steps identified during the Briefing.

Plan the Agenda

Plan an agenda with the customer and partner with your team to determine Briefing goals. Every Briefing ends with a clear action plan and next steps.

An action plan consists of:

- Identifying the customer's key goals and any gaps that may hinder them.
- Establishing key priorities where our team can partner with the customer to achieve those goals.
- Initiating a timeline for both short- and long-term goals.

Briefing Example Agendas

Discovery Briefing Sample Agenda

- Welcome and Introductions
- Company Overview
- Apple Support
- Next Steps

Project Briefing Sample Agenda

- Welcome and Introductions
- Project Overview
- Apple Business Solutions
- Apple Support
- Next Steps

Frequency

Consider your customer's goals when determining how often to host a Briefing with them. More complex needs may require a quarterly or semi-annual review schedule.

Briefing Resources

Who attends the Briefing?

- Identify Briefing participants within the customer's company as well as our team and other Apple partners.
- Consider the need that is driving the Briefing. Is it technical, operational, or strategic?
- Keep a reasonable ratio of team members to the number of customers.
- Everyone should come into the Briefing with a clear understanding of their role.

Briefing Roles and Responsibilities

Follow the Briefing Roles and Responsibilities guidelines to ensure a great customer experience before, during, and after the Briefing.

Training Resources

RetailMe Training

The Briefing Experience

RetailMe Materials

Business Modular Training

Business Brief

The Business Brief is an **internal**, living document containing the most relevant details you've discovered about the customer.

Share it with your team before the Briefing and update it with any new information afterwards.

Business Brief

Sales Account Details

Opportunity Information

Review the information from the latest brief, update it here, and attach in the appropriate place in Apple CRM.

Company Name:		**Date:**	
Primary Contact:		**Sales Account ID:**	
Title:		**Customer Type:**	[Growth, Core, Biz Dev]
Opportunity ID:			

Customer Overview Who is your customer? What do they do, and why? How is the organization structured?	Include: • Mission, core values • Who their customers are • Employee size • Office or employee locations • Expected growth or changes
What you know:	
What's new:	

Example of the Business Brief template.

Prepare for a Briefing

Delivering a successful Briefing involves multiple steps leading up to the meeting.

- Customer discovery
- Briefing team planning
- Pre-Briefing call

Questions to use during a Briefing

Discovery

- What inspired them to start their business?
- How has that inspiration changed over time?
- Which Apple products, services, and best practices does the customer know about, and which are they using?
- Have we identified the challenge is the customer trying to solve?
- What is their timeline to address their needs?
- What might be preventing them from moving forward?
- How have technology changes impacted their business?
- Who makes their technology decisions?
- What does their purchasing process look like?

Briefing Team Planning

- What is the technical level of the Briefing?
- Who from our team should attend the Briefing?
- Does our team have clear expectations of what the Briefing should accomplish?

Pre-Briefing Call

- What items will be discussed during the Briefing?
- Does the customer have clear expectations of what the Briefing will accomplish?

Technical Levels of a Briefing

	Low	Medium	High
Devices	1-10 devices in use or being considered	More than 10 devices in use or being considered	More than 100 devices in use or being considered
Platform	Primarily using only one device category (e.g., Mac or iPhone)	Mac and iOS. iOS devices may be company-owned or Bring-Your-Own-Device (BYOD).	Mixed platforms. PCs and Macs. Technology may be a mix of older and newer models.
Apple Footprint	Business may be small or have a very small Apple footprint.	Business may be committed to Apple as a platform, but on a smaller scale.	Business is committed to Apple as a platform. They are larger scale and/or growing.
Device Management	Minimal device management. Individuals may be using personal Apple IDs. Access to business systems may require manual configuration.	Mobile Device Management may save time, lower support costs, increase security, and allow for more efficient app deployment.	Mobile Device Management, Volume Purchase Program, and Device Enrollment Program (if appropriate and available) should be positioned.
When do we host a Briefing?	A Briefing may be a good fit if the customer would like to collaborate to find a solution or needs a strategy around technology growth or deployment.	A Briefing is a good fit once we have a clear understanding of the customer's current setup and their future goals. Even without a plan to purchase, a Briefing can help ensure they are using and managing their existing technology effectively.	A Briefing should be positioned as soon as the customer is ready to work with us on a long-term strategy for technology deployment and plan specific acton items.
Resources	Leverage in-store resources, such as Creatives or the Genius Bar. Consider involving an ACN if you identify a need for on-site support.	Solutions Engineer should be included, especially if the company is growing, requires cross-platform integration, or advanced topics like VPP and DEP will be discussed. Consider involving an ACN if you identify a need for consulting services.	Plan to involve a Solutions Engineer to the Briefing. Consider involving an ACN if you identify a need for on-site support.

Schedule Briefings

Allow enough time for your customer and your team to prepare. There should be at least one call scheduled prior to the Briefing for discovery and to build an agenda for the Briefing.

- Schedule a separate call on the day before the Briefing to confirm attendance and validate expectations.
- Create the appropriate tasks in Apple CRM.
- Schedule the Briefing in Concierge.
- Invite internal partners using Calendar.

Perform Additional Customer Research

This is the time to get more familiar with what the customer has been working on recently.

- Spend up to one hour learning more about the customer's business.
- Review the Sales Account history and purchase activity in Apple CRM.
- Revisit their company website to see if there is recent news or activity.
- Search the web and social media for recent news or activity.
- Look for Briefing attendees to see if they have published industry articles.
- Attempt to find clues about the top priorities within their company. Add relevant information to their Sales Account in Apple CRM.
- Review the drafted agenda.

Pre-Briefing Call

- Review the drafted agenda. Use the Business Brief (not customer-facing) as a guide to identify what might be missing.
- During the call, clarify and recap the needs of the customer.
- Work together to finalize clear objectives and finalize the agenda.

Prepare Your Team for a Briefing

- Upload the Business Brief to Apple CRM and to the internal Calendar event.

  > **Note**
  > Team members should read the Business Brief to prepare. Agree on what you intend to learn and questions to have answered during the Briefing.

- Determine the person responsible for the Briefing.

  > **Note**
  > This individual will begin the meeting and review the agenda at the beginning. They will also be responsible for time-keeping.

- Assign speakers to the different agenda items.
- Take note of what is learned, which solutions are presented, and what the next steps are. These notes should be added to the completed Briefing task in Apple CRM.

Delivering a Briefing

Framework for a Briefing

Refer to Discover, Collaborate, Validate, Initiate to learn more about our approach to the Briefing experience.

Environment

In person

- Determine where in the store will you meet and that the area ready for customers.
- Will you offer seating? If so, carefully plan where you want customers to sit.

Over the phone or WebEx

- Take the call in a quiet area to avoid background noise.

Off Site (at the customer's location/offices)

- Determine the equipment available in the premises
- Confirm the technical environment, especially if a demo is planned: (Wi-Fi, displays, etc.)

Introductions

- Team members should introduce themselves first, offering name and role.
- Let customers know why each team member is in the meeting.
- Ask customers to introduce themselves.

Review Agenda

- Validate expectations and make sure the agenda still aligns with the customer's needs.
- Ask if anything else should be added before beginning.

Post-Briefing Activity

1. Customer Follow Up

Prompt action following a Briefing demonstrates our commitment to give the customer the best possible journey with Apple.

Send a thank you email.

Include any documents or resource links discussed during the Briefing.

2. Update Apple CRM

Notate new information in Apple CRM while it's still fresh in your mind.

- Add notes, including discovery, topics discussed, solutions presented, and an action plan.
- Create or update any related opportunity records.
- Create follow-up tasks where necessary.

3. Assess Briefing

Meet as a team and review the meeting.

- What questions were answered?
- Are all attendees clear on next steps?
- Were the right parties at the Briefing? Why or why not?
- What could we have done differently during the Briefing?
- Was the Briefing successful based on the goals of your team? If not, what resources could help you improve for next time?

4. Initiate next steps.